Consumer Marketing Report

Presented to the Tourism Advisory Council

Lewistown, Montana October 2, 2007



Inquiries & Web Visitation

Warm Season Inquiries

January 1-August 31, 2006 & 2007

Campaign	2006	2007	% Change
Warm Season:			
Print	51,464	56,183	9%
Television	13,492	1,426	-89%
Misc. Promo	5,273	7,456	41%
WS TOTAL	70,229	68,065	-3%
3 Parks	Incomplete (FY07 Fall Campaign still in progress)		
Misc. Inquiries	19,414	11,525	-41%
GRAND TOTAL	89,643	76,590	-15%



Internet Analysis

January 1-August 31, 2006 & 2007

Website	2006	2007	% Change
Visit MT	4,664,823	6,595,102	41%
Winter	950,445	1,199,415	26%
3 Parks	40,123	45,377	13%
Lewis & Clark	268,748	263,947	-2%
Montana Kids!	1,014,416	923,606	-9%
Indian Nations	213,047	386,589	81%
Dinosaur Trail	100,508	164,556	64%
GRAND TOTAL	7,252,110	9,578,592	32%



Campaign Totals

2006 & 2007

Campaign	2006	2007	% Change
Warm Season	89,642	76,590	-15%
Internet	7,252,110	9,578,592	32%
GRAND TOTAL*	7,341,752	9,655,182	32%

^{*}Does not include 3 Parks or Invite-A-Friend



Warm Season Updates



Sweepstakes Winners

- Montana Kids!
 - Anne Dreher, Fenton, MI
- Montana Treasure Trek (Minnesota)
 - Ron McCloud, Maple Grove, MN
- Montana Treasure Trek (Drive Market)
 - Richard Brogdon, LaPine, OR
- Backpacker
 - Jack Anderson, Colorado Springs, CO



Research Underway

Website conversion studies

- SkiMT/WinterMT.com recently completed
- VisitMT.com conversion component in process

Branding

- Focus groups completed in August
- Statewide workshops to be held in November

Magazine conversion study (FY07)

- To begin this fall
- · Incorporating an additional geotourist element



2007-08 Winter Campaign

- National Campaign
- Key Market- Minneapolis/St. Paul
- Key Market- Seattle
- In-State/MSAA Partnership
- Snowmobile Campaign

TOTAL BUDGET: \$758,676.99



National Winter Campaign

- Magazine
- Internet
- Direct Mail
- Outside's PowderPlay Tour



Publications

- NWA WorldTraveler (4pg co-op spread)*
- Sunset: Inside Seattle (one-page co-op)
- Outside*
- Outside Buyer's Guide*
- Horizon Air
- Ski
- Skiing
- SnoWorld
- Freeskier
- National Geographic Traveler

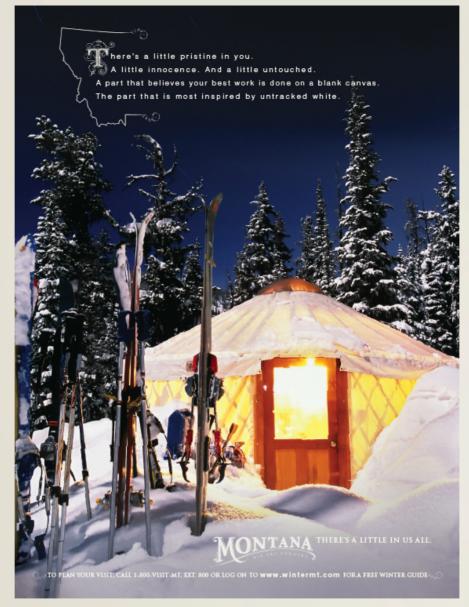
*Includes advertorial





- Campaign runs Oct 07 through Dec 07
- \$176,778.06
 - Co-op contribution: \$5,212.48 (3% of total)
- Circulation: 4,245,000
- CPM: \$40.42















GOLD WEST COUNTRY, MONTANA: WHERE FIRE & ICE AWAIT

Gold West Country, a fabled landscape perched in the mountains of southwestern Montana, offers the gamut of winter fun. Blend a morning of cross-country sking or snowshoeing through the historic mining camps of Mount Haggin with an afternoon of rejuvenating soaking at Jackson Hot Springs Resort. You'll also find a number of spirited, "mom & pop" ski areas such as Lost Trail Powder Mountain, Maverick and Great Divide that will remind you why you fell in love with the sport in the first place. Did we mention nonexistent lift lines?

Those of the moto-persuasion will find a bounty of groomed snowmobiling trails in Gold West Country, Powder hounds will froth at the deep snow bounty that awaits in the region's expansive national forests. Throttle up, cowboy.

GLACIER COUNTRY, MONTANA: DON'T BE FRIGHTENED BY THE SNOW GHOSTS

Located in northwestern Montana, near the charming railroad town of Whitefish, the newly renamed Whitefish Mountain Resort (formerly Big Mountain) offers an unparalleled sking (and snowboarding!) experience. Glide through powder draped trees, affectionately called "snow ghosts." Between runs marvel at the surrounding peaks that include the dramatic alpine backdrop of Glacier National Park. After sking, wet your whistle at the famous Hellroaring Saloon (their nachos are world-class) or sook in the history of the Great Northern Railroad at the Stumptown Museum. If a slightly slower pace is more your speed, glide into Glacier National Park on your cross-country skis or snowshoes and enjoy the solitude and frosty beauty the winter months bring to this historic national park.







WINTER EVENTS

CHRISTMAS STROLLS (Missoula, Bozeman & Lewistown) December 1-8, 2007

ESSEX ANNUAL SKI FEST (Essex) January 5-6

RACE TO THE SKY SLED DOG RACE (Helena) February 8-14

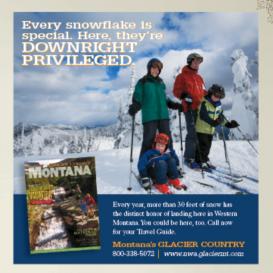
WILD WEST WINTERFEST (Bozeman) February 15-17

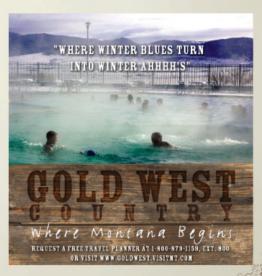
RENDEZVOUS CROSS-COUNTRY SKI RACE (WestYellowstone) February 23

NATIONAL SKI JORING FINALS (Red Lodge) March 8-9









WorldTraveler Co-op





Sunset Co-op

Winter Internet

Search Engines

Google, Kanoodle, Yahoo!

Banner Ads & Text Listings

- Away Network *new for FY08 winter*
 - Includes away.com, gorp.com, gorptravel.com, outside.com
- freeskier.com
- onthesnow.com (Mountain News)
- rsn.com / goski.com (Resorts Sports Ntwk)
- skinet.com (Ski / Skiing / SnoWorld magazines)
- xcskiworld.com (Cross Country Ski World)
- xcski.org (Cross Country Ski Assn.)



Winter Internet

E-newsletter "e-vertorial"

• freeskier.com

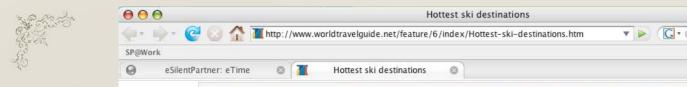
Web Video (:10 and :15 sec pre-roll)

- freeskier.com
- skinet.com
- accuweather.com

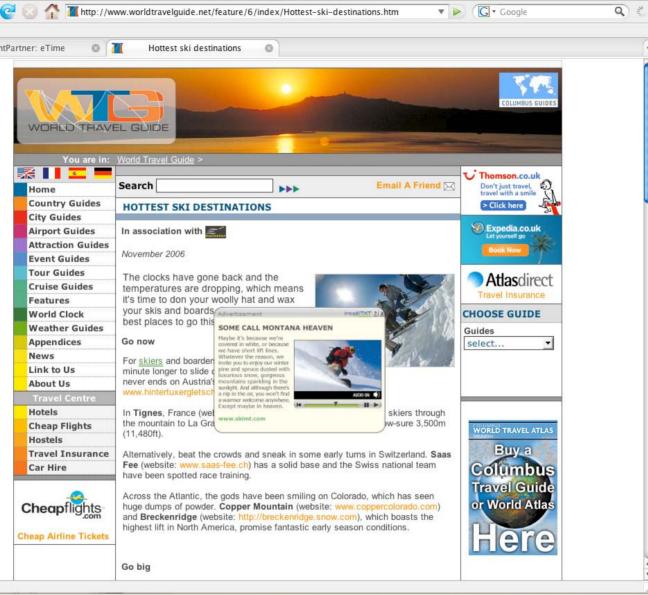
In-Text Video Advertising

• Vibrant Media (includes MSNBC, Fox, and other sites)





Done



In-text Internet Advertising



Winter Internet Co-ops

Onthesnow.com email blast

- Bozeman CVB
- Yellowstone Country
- Big Sky Resort
- Bridger Bowl

Away.com & network geo-targeted banners

Bozeman CVB

Accuweather.com streaming pre-roll video

- Glacier Country
- Yellowstone Country
- Big Sky Resort



Winter Internet Co-ops

continued

Freeskier.com streaming pre-roll video

- Big Sky Resort
- Bridger Bowl

Skinet.com streaming pre-roll video

- Bozeman CVB
- Bridger Bowl

In-text, pay-per-click streaming video

Big Sky Resort



Winter Internet

Timing

November 07 through March 08

Search Engines/In-text

• Cost: \$49,280.00

Clicks: 75,000

Cost-per-click: \$0.66

Content Websites

Cost: \$60,369.20

Impressions: 2,725,000

CPM: \$22.15



Winter Internet

Total Budget: \$109,649.20

Co-op contribution

- \$14,885.92 (14% of total)
- 340,000 impressions/clicks (12% of total)

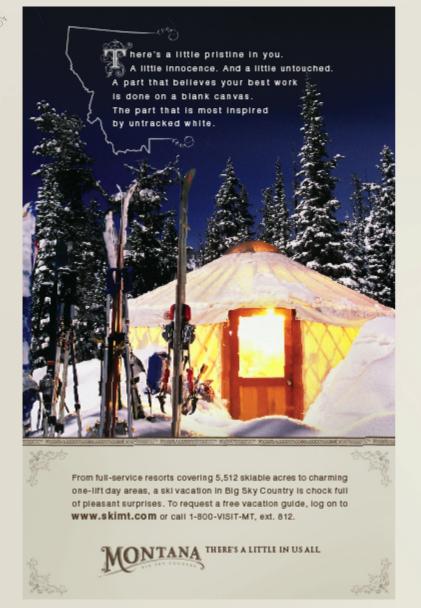


Direct Mail

Treasure Chest

- 4C, double-sided insert
- Skiers mailing (Oct 07): 500,000 recipients
- Vacationers mailing (Oct 07): 500,000 recipients
- Cost: \$17,500
 - includes April 08 mailing to 500,000







Direct Mail (Front & Back)



PowderPlay Tour

- Added-value with Outside Magazine
- Promotional materials to be distributed
- One- and two-day events in four cities
 - Boston
 - Dallas
 - Chicago
 - San Francisco (Icer Air event)



MN Key Market

- Billboard
- Radio
- Coffee Sleeves
- Montana Roadshow at REI



Billboard (MN)

- Nov 2007 through Feb 2008
- One board strategically placed
 - coming into Minneapolis from SE suburbs
- \$15,882.75
- 3,294,000 impressions
- CPM: \$4.82



Radio (MN)

- Air dates: 2 weeks prior to Roadshow
 - Weeks of October I & October 8, 2007
- Four stations
- \$57,856.85
- MN Creative: one spot featuring Gov. Schweitzer







- Coffee sleeves (2 designs) printed w/customized Montana/MN message
- 367,500 sleeves distributed via 35 independent café locations
- November 2007 through January 2008
- \$30,702.00 (\$0.08 cost per cup)



Coffee Sleeves (MN)



Montana Roadshow

- October 13 &14, 2007
- REI store in Bloomington, MN
- Attending
 - Travel Montana
 - 5 Major Ski Areas: Big Sky, Bridger, Moonlight, Red Lodge & Whitefish
 - Bozeman/West Yellowstone CVB
 - Glacier Country/Missoula CVB
 - Whitefish CVB
- Promotion
 - REI e-newsletter & event invite- Sept & Oct
 - Travel MT e-invite- October
 - Travel MT post-show e-blast
 - Roadshow giveaway webpage



REI E-mail Blast





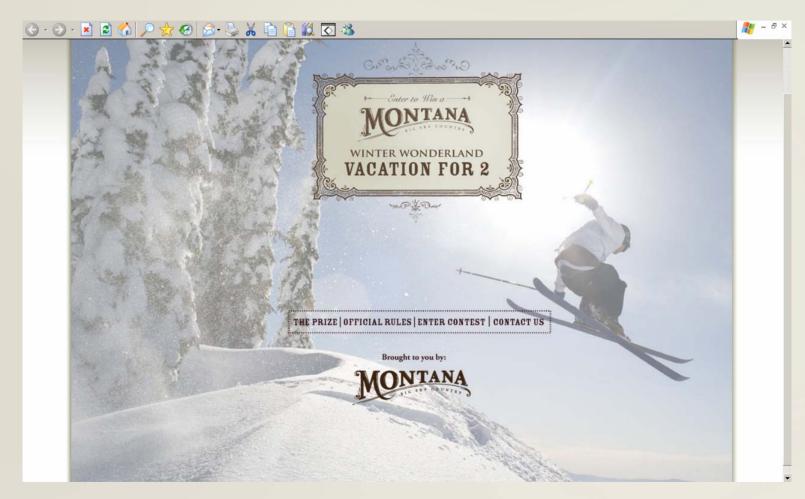
OCTOBER 13-14

Chat with reps from 5 Montana ski areas & 5 tourism regions on Saturday from 10am-9pm and Sunday from 11am-6pm. Drawings & free giveaways will occur throughout this 2-day event. Register to win a winter trip for two to Montana. **ENTER TO WIN!**

SKIMT.COM



Winter Giveaway Webpage





Seattle Key Market

- Print Campaign
- Radio
- Coffee Sleeves
- Montana Roadshow at REI



Print Campaign (SEA)

- 4 weeks in November 2007
- 4C and B&W ads; creative TBD
- Seattle Times, Seattle Post-Intelligencer, & Pacific NW Magazine
- \$18,795.11
- Circulation: 1,665,888
- CPM: \$11.28



Commercial Radio (SEA)

- Air dates: 2 weeks prior to Roadshow
 - Weeks of October 29 & November 5, 2007
- Four stations
- \$36,509.20
- SEA Creative: one spot featuring Gov. Schweitzer





Public Radio (SEA)

- Puget Sound Public Radio sponsorship
- Air dates: Nov 07 through Jan 08
- :10 online streaming audio pre-roll
- Cost: \$5,712.00
- Impressions: 705,710
- CPM: \$8.09





- Coffee sleeves (2 designs) printed w/customized Montana/SEA message
- 525,000 sleeves distributed via 50 independent café locations
- November 2007 through January 2008
- \$44,100.00 (\$0.084 cost per cup)



Coffee Sleeves (SEA)





Montana Roadshow

- November 10 & 11, 2007
- REI flagship store in Seattle, WA
- Attending
 - Travel Montana
 - 5 Major Ski Areas: Big Sky, Bridger, Moonlight, Red Lodge & Whitefish
 - Bozeman/West Yellowstone CVB
 - Glacier Country/Missoula CVB
 - Whitefish CVB
- Promotion
 - REI e-newsletter & event invite- Oct & Nov
 - Travel MT e-invite- Nov
 - Travel MT post-show e-blast
 - Roadshow giveaway webpage





- In-state & regional web campaign utilizing ski footage from FY07 co-op
- :15 web videos will be created and rotated throughout 4-month campaign
- Will drive traffic to <u>www.skimt.com</u> & ski area webpages
- Travel Montana e-Marketing dept integrating snow conditions reporting & increasing visibility of "Learn to Ski" program on www.skimt.com



Internet Media: MT Newspapers

- Standalone and :15 preroll on major MT newspaper websites
- Mid-November 2007 through mid-March 2008
 - Missoulian.com
 - RavalliRepublic.com
 - BillingsGazette.com
 - HelenalR.com
 - MontanaStandard.com
 - DailyInterlake.com
 - BozemanDailyChronicle.com
 - GreatFallsTribune.com



Internet Media: Regional Newspapers

- Standalone video with ski report on regional newspaper websites
- Mid-November 2007 through mid-March 2008
 - SouthIdahoPress.com (Burley/Hailey, ID)
 - MagicValley.com (Twin Falls, ID)
 - RapidCityJournal.com (Rapid City, SD)
 - BismarckTribune.com (Bismarck, ND)
 - Tdn.com (Longview, WA)



Internet Media: MT TV News

- :15 pre-roll video on Montana TV news websites (CBS affiliates)
- December 2007 through February 2008
 - Ktvq.com (Billings)
 - Kbzk.com/kxlf.com (Bozeman/Butte)
 - Krtv.com/kslh.com (Great Falls/Helena)
 - Kpax.com/kaj.com (Missoula/Kalispell)



Internet Media: NewWest.net

- NewWest.net
- November 15, 2007-March 15, 2008
 - Exclusive snowblog sponsorship
 - Banners
 - Blogvertorial
 - Video links



NewWest.net Placement





Budget & Campaign Cost

- Campaign budget: \$45,000
 - Travel Montana contributes \$30,000
 - MSAA contributes \$15,000
- Campaign media cost: \$35,347.20
- Impressions: 2,705,000
- CPM: \$13.07



SkiMT.com

New Design for Ski Area Webpages

Sample: Whitefish Mountain Resort

http://skimt.com/dhski/whitefish_mountain_resort.htm



Sled the Rockies

Snowmobile Campaign



FY06 Snowmobile Campaign Results

- Advertising Recap
 - 15,365 clicks
 - 0.30% click-through rate
 - \$2.35 cost per click
- Visitor sessions up 19% (30,083 in FY06 vs. 25,305 in FY05)
- Montana's page was the #1 visited state page
- Contest entries
 - 9,325 entries (vs. 2,797 entries in FY05) up 233%
 - Contest winners from NV, CO, & NC
 - 40% of entries were from western states
 - MN & WI represented largest non-western states
 - 6.84% and 6.53% of entries, respectively



FY07 Snowmobile Print

Publications

- AAA Living
- American Snowmobiler
- Home & Away
- National Geographic Adventure
- Outside
- •SnoWest
- SnowGoer
- Sunset
- •VIA
- Western Guide to Snowmobiling
- State Snowmobile Assn. Publications
 - •MN, WI, & MI

Total Cost

\$47,100.40

Total Circ

8,342,836

CPM: \$5.65



Snowmobile Print



Snowmobile Internet

Search Engines

- Overture.com
- Google.com

Content Websites

- SnoWest.com banner ads, e-NL, webcam sponsorship
- Off-Road.com banner ads & micro-site
- Weather.com geo-targeted banner placement

Ad Serving/Ad Tracking



Snowmobile Internet

Timing

November 1, 2007 - March 31, 2008

Creative

Idaho to develop; co-op to approve

Cost

\$39,999.12

Impressions/Clicks

Search Engines: 8,933 (\$0.90 cost per click)

Content Sites: at least 3,178,950 (CPM n/a)



www.SledTheRockies.com

Updated Look, New Content



Presentation will be available at:

www.TravelMontana.mt.gov

